

DEFENSE PRICING AND CONTRACTING PROCURE -TO-PAY

& FINANCIAL AUDIT
TRAINING
SYMPOSIUM



April 22 – 25, 2019 • Hilton Lake Buena Vista, FL

Welcome Letter

Welcome to the 2019 Procure-to-Pay (P2P) and Financial Audit Training Symposium, co-hosted with the DoD Comptroller! We are happy to welcome you back to update you on the progress that's been made over the year. We are pleased to be joined by procurement and finance leadership from across the Department of Defense's Services and Agencies, as well as our partners and leaders from Logistics, the General Services Administration, and the Office of Management and Budget.

This symposium will provide training to procurement, acquisition, logistics, and financial management personnel on how to apply enterprise data standards and protocols across Component procurement, logistics, and finance environments. We will provide training sessions on process improvement initiatives which are helping to improve P2P performance across the Department, achieve the transparency required by the DATA Act, and meet Financial Improvement and Audit Readiness (FIAR) goals.

We look forward to sharing with you the accomplishments that we have made against the Department's Strategic Plan for Defense Wide Procurement Capabilities, and identifying those goals that we are working to achieve in Fiscal Years 19, 20 and beyond. Critical among these objectives will be expanding the use of enterprise standards, better leveraging our contract and finance data through the use of business intelligence tools, and increased adoption of enterprise tools/services. We will discuss the progress made in DoD's Financial Reform effort, and the challenges that remain.

Defense Pricing and Contracting (DPC) and partners will also share information on enterprise initiatives, including the deployment of the Procurement Integrated Enterprise Environment, the new consolidated ecosystem for Government Furnished Property, and an update to the Grants Reporting process and systems. There will be special input provided by General Services Administration (GSA) addressing the beta.SAM implementation in the Integrated Award Environment modernization. In addition, we will give you updates on emerging systems and initiatives such as Robotics Process Administration, Procurement Administrative Lead Time, and supplier risk tracking.

In-person events like these encourage knowledge sharing between organizations and facilitate collective problem solving of shared challenges. To that end, subject matter experts will be available both in formal and informal Q&A sessions to help answer specific questions and provide targeted guidance and recommendations. We hope that these sessions empower you to continue to lead the Department's transformation efforts. Thank you for taking the time out of your busy schedule to participate.

Sincerely,



LeAntha Sumpter

Director for Contracting eBusiness
Defense Pricing and Contracting

Office of the Under Secretary of Defense for Acquisition and Sustainment



Session Agenda

Monday, April 22, 2019

East/West Registration

1:00 – 7:00 **Check In/Registration**

International South

1:00 – 5:00 **Air Force Functional Requirements Board Meeting**
POC Patrick Knepper

Tuesday, April 23, 2019

East/West Registration – Morning

7:00 – 5:00 **Check In/Registration**

Palm Foyer/Palm Patio

7:30 – 8:30 **Networking**

Palm Ballroom

8:30 – 8:40 **Welcome and Overview**
Lisa Romney, A&S DPC

8:40 – 9:25 **Procure-to-Pay (P2P) Handshakes Overview**
LeAntha Sumpter, A&S DPC, and Lora Muchmore, OUSD(C)/BIO FM Reform
 Throughout the Procure-to-Pay process, nine “handshakes,” or interchanges, occur between procurement and finance organizations and systems. This session will review the handshakes, and provide an update on the current status and related efforts for each.

9:25 – 10:00 **DoD Audit and Financial Management Reform**
Mark Easton OSD(Comptroller)
 Improved quality and transparency of financial data helps the DoD make fully-informed decisions about how federal resources should be allocated. The current financial audit regimen also provides transactional data and, when combined with analytical tools, can help prevent improper payments and fraudulent spending. This session will review the progress made in DoD Financial Management reform, and the work yet to be done.

Palm Foyer/Palm Patio

10:00 – 10:20 **Break**

Palm Ballroom

10:20 – 11:15 **The Federal Perspective**
Karen Pica, Office of Federal Procurement Policy, OMB
 Hear from our OMB leadership on the latest Procurement and Financial Management initiatives at the federal level, and what DoD’s communities need to know.

11:15 – 12:00 **Robotic Process Automation: What Is It and How Can It Benefit Organizations?**
Erica Thomas, OUSD(C)/BIO FM Reform, John Lockwood (DLA); Christine Gex (Army), Mitchell Winans (IRS), Tom Sutton (Lockheed Martin)
 Organizations are adopting RPA to automate standard and repetitive processes, allowing employees to focus on high value work. Attendees will learn about Agencies’ progress to leverage RPA software within the FM and Procurement communities, with a focus on benefits realized and recommended best business practices to identifying RPA opportunities.

Session Agenda

Grand Ballroom

12:00 – 1:00 **Lunch and Exhibits**

Break Out Sessions – Afternoon

	Grand 1-3	International South	International Center	International North	Palm 3-5
1:00 – 1:50	G-Invoicing Opportunities and Challenges <i>Marilyn Forney</i> Intragovernmental Transactions are a material weakness across the federal government. Come to this session to learn how DoD is addressing this challenge through the implementation of G-Invoicing, and the steps you can take now to support our transition.	Cost Management Initiatives <i>Greg Little</i> The ability to reduce and manage costs more strategically is critical. This session will explore the Department's efforts to develop a management accounting capability that will improve its ability to predict expenditures, execute budgets, and maximize resources.	Procurement Integrated Enterprise Environment (PIEE) Hierarchy* <i>Lisa Romney, Adarryl Roberts, and Matt Jacobs</i> The PIEE hierarchy drives user experience and access within this data-centric environment, and supports management of multiple enterprise procurement capabilities. Learn how you can use the hierarchy to best support your business.	PCM – Contractor DoDAAC Requests <i>Carol Vigna and Kris Humphrey</i> DoD Activity Addressing Codes are assigned to contractors to allow them to participate in the DoD Supply System. The new Purpose Code Module – Contractor DoDAAC request system is being introduced to support contracting's proper role in managing contractor DoDAACs. Come learn how you can integrate this tool into your business process.	Contract Closeout – Quick Closeout <i>Bruce Probert, Irene Johnson, Larry Lizana, and Dave Guinasso</i> Come hear how DCMA's Packard Award winning team utilized Quick Closeout Procedures and a risk-based approach to closeout to expedite the closeout of contracts and how this approach is being adopted by the Agency. Also hear from DPC on updates to Quick Closeout policy.
2:00 – 2:50	FBO and System Administration* <i>Transition to beta.SAM</i> <i>Kat Rollins</i> The General Services Administration has been working to modernize the Integrated Award Environment systems. In this workshop, we will share how to position yourself and your agency to smoothly migrate from WDOL.gov (decommissioning June 2019) and FBO.gov (decommissioning early FY2020). This includes moving to login.gov, migrating legacy roles, administering roles, and inclusion of a single federal hierarchy.	Managing Financial Management Data and the Universe of Transactions <i>Greg Little</i> Universe of transactions (UOT) refers to the entirety of underlying, individual accounting transactions that support a financial statement line or balance. In this session, representatives from the Comptroller's office will share how this data is being collected, managed, and used for audit support and reporting.	FedMall Implementation* <i>Kathleen Lemming, Adarryl Roberts, and Matt Jacobs</i> Come and check out FedMall! This modernized, COTS-based tool deployed in 2017 with eCommerce capability and an improved and streamlined user experience. Join the FedMall PMO to learn more about the tool's capabilities, including new integrations with the Supplier Performance Risk System (SPRS) and the Joint Appointment Module (JAM).	Government-Furnished Property Module Overview* <i>Carol Vigna and Pam Rooney</i> Accurate tracking of Government Furnished Property (GFP) requires a full life-cycle approach to ensure appropriate accountability and traceability. The GFP Module will provide a consolidated ecosystem for GFP management that will require assistance from a variety of communities. In this session, we will describe the GFP Module's current essential capabilities and the plans for implementation of the future phases that will include dispositioning and sending updates to property books.	Contract Closeout Accomplishments and EDA Reports* <i>Bruce Probert, Joyce Gamboa, and Dave Guinasso</i> Contract closeout is an often under-appreciated step in the full Procure-to-Pay lifecycle. Come to this session to learn about the tools available for contract closeout and how they make the process more efficient. This includes the latest policy, tools and reports available to support the closeout process.

* Session will be repeated

Session Agenda

2:50 – 3:10	Break and Exhibits				
	Grand 1-3	International South	International Center	International North	Palm 3-5
3:10 – 4:00	Transition of Reports from FPDS to beta.SAM* <i>Christy Hermansen</i> This session takes you through the upcoming transition of standard and ad-hoc reports from FPDS.gov to beta.SAM.gov. The session will cover schedule information for the transition, features of the new reports, and a live demo. You will have time to ask questions and provide feedback.	Supplier Performance Risk System (SPRS) <i>Mae Bartley and Alan Robinson</i> SPRS is a web-enabled enterprise application that gathers, processes, and displays data about the performance of suppliers. Come learn how you can leverage SPRS data to better understand contractor performance and avoid risky offerors.	Procurement Business Intelligence System <i>Gary Wolanske and Terry Ford</i> Our enterprise environment stores masses of data related to contract awards. However, this data is not always accessible to our procurement professionals. Come to this session to see how DPC's Business Intelligence tools are making this data available and presenting it in ways that can help you do your job and make smarter procurement decisions.	Government Furnished Property Attachment* <i>Carol Vigna and Pam Rooney</i> Having an accurate GFP Attachment is more important than ever in our current audit environment and requires collaboration from many different communities, such as program offices, logistics, property officers and contracting. We'll focus on the benefits of the GFP Attachment, advice for common issues and errors, briefly describe the method for creating one in the GFP Module, and answer any questions you may have!	Improving Contract Quality <i>Bruce Probert and Kris Humphrey</i> Properly constructed contracts and contract line items are essential to good contract data quality. This session will discuss common errors found through Procurement Data Standard (PDS) edits and IV&V and their root causes. Includes a Q&A time to ask your line item creation questions!
4:10 – 5:00	Purpose Code Module (PCM) – Purpose Codes and Payment/CAO Office Management <i>Carol Vigna and Kris Humphrey</i> The new Purpose Code Module strengthens procurement and finance's management capabilities over DoDAAC purpose codes and Payment/Contract Administration Office assignments. Come learn how you can integrate this tool into your business process.	Contract Pay Pain Points – the Financial Management Perspective <i>Erica Thomas, Ed Burke, Liz Gibbs, and Joe Maus</i> There are many challenges within our end-to-end contract pay processes that cause manual processes, re-work, and auditability concerns. Come hear the top FM pain points and the initiatives currently underway, or being planned, to solve them.	EDA Next Generation* <i>Terry Ford and Adarryl Roberts (or delegate)</i> The Electronic Document Access (EDA) system has been redesigned to be more intuitive and easier to access. Come learn about the changes and how you can use EDA to support your contracting processes.	GFP Module Phase 3 PCARSS/PLT* <i>Carol Vigna, Pam Rooney, Luke Wayne, and Karen Yamnitz</i> The next phase of the GFP Module application will focus on dispositioning GFP and will incorporate a tech refresh of DCMA's Property Loss Tool (PLT) and Plant Clearance Automated Reutilization Screening System (PCARSS) into the GFP Module environment and the related benefits. We'll talk about the features of the PLT and PCARSS processes planned for the GFP Module, timelines, what to expect and how these changes will benefit you, your contracts and programs.	Standard Procurement System (SPS) Update <i>Jackie Bostic, Darryn Miller, Semy Rosemond, and Pete Jutin</i> SPS still plays a critical part in supporting the Department's contract writing capabilities. Come to this session to hear about the state of the technology in the SPS software and learn about current issues and future plans for the product.

* Session will be repeated

Session Agenda

Wednesday, April 24, 2019

East/West Registration – Morning

7:30 – 5:00 **Registration**

Grand Ballroom

7:30 – 8:30 **Networking and Exhibits**

Palm Ballroom

8:30 – 9:15	Strategic Plan Accomplishments <i>LeAntha Sumpter, A&S DPC</i> DPC leadership will share progress and successes in executing to the Defense-Wide Procurement Capabilities (A Functional Strategy).
9:15 – 9:55	Acquisition and Sustainment Vision <i>Kim Herrington, Acting Principal Director, Defense Pricing and Contracting</i> The new Acting Principal Director of Defense Pricing and Contracting will share the organization's vision for 2019 and beyond.
9:55 – 10:25	The Integrated Award Environment (IAE) – The DoD Perspective <i>Lisa Romney, A&S DPC</i> The Integrated Award Environment is undergoing significant changes with the move to beta.SAM. Hear about how you can prepare your business processes, data standards, and systems as SAM consolidates with FBO, FPDS, and more.

Palm Foyer/Palm Patio

10:25 – 10:45 **Break**

Palm Ballroom

10:45 – 11:30	Government-Furnished Property Overview <i>Carol Vigna, A&S DPC; Mindy Rash-Gehres, Department of Navy Logistics Policy & Property Management; Quitty Lawrence, Air Force Logistics Readiness Policy; Joel Lockhart and CW5 Cheryl Bartly, DASA(Acquisition, Policy, and Logistics)</i> GFP Service leads will provide highlights of their current challenges and successes with managing their GFP and the current FIAR audit impacts.
11:30 – 12:00	Procurement Integrated Enterprise Environment (PIEE) Overview <i>LeAntha Sumpter, A&S DPC and Adarryl Roberts, DLA</i> The PIEE is a scalable, efficient, data-centric environment to host and support enterprise procurement capabilities. It hosts a Data Lake that offers the ability to search and query integrated contract data from enterprise procurement systems. This session will discuss how PIEE gives us unprecedented connections and insights into operational data.

Grand Ballroom

12:00 – 1:00 **Lunch and Exhibits**

Session Agenda

Break Out Sessions – Afternoon

	Grand 1-3	International South	International Center	International North	Palm 3-5
1:00 – 1:50	Surviving Data Transition from SPS <i>Patrick Knepper, Bill Woods, Lara Emmons, and Greg Youmans</i> <p>As DoD's newly-consolidated contract writing systems deploy, the migration of data from the legacy Standard Procurement System (SPS) is a common challenge. Come hear first-hand how the Air Force and Army met this challenge; capture lessons learned for your own data migrations.</p>	PALT, Protest Tracker Tool Demo <i>Greg Snyder, Lisa Romney, and Kris Humphrey</i> <p>The 2017 National Defense Authorization Act required the creation of two new data collection tools: the Procurement Acquisition Lead Time (PALT) tracker is essential to ensuring that our contracting processes are efficient and timely, and the Protest Tracker, which will measure costs incurred to the Department through solicitation and contract protests. Come see a demonstration of both tools.</p>	FedMall Implementation** <i>Kathleen Lemming, Adarryl Roberts, and Matt Jacobs</i> <p>Come and check out FedMall! This modernized, COTS-based tool deployed in 2017 with eCommerce capability and an improved and streamlined user experience. Join the FedMall PMO to learn more about the tool's capabilities, including new integrations with the Supplier Performance Risk System (SPRS) and the Joint Appointment Module (JAM).</p>	Reporting Grants FAADC Implementation <i>Jovanka Caton and Brian Davidson</i> <p>The Federal Assistance Award Data Collection tool (FAADC) will be launched this month to capture all types of assistance awards made by DoD to support Federal Funding Accountability and Transparency Act reporting and traceability of funding. Come learn about the procedures for reporting awards to this enterprise system and get a preview of the successor system to DAADS.</p>	Contract Closeout Accomplishments and EDA Reports** <i>Bruce Propert, Joyce Gamboa, and Dave Guinasso</i> <p>Contract closeout is an often under-appreciated step in the full Procure-to-Pay lifecycle. Come to this session to learn about the tools available for contract closeout and how they make the process more efficient. This includes the latest policy, tools and reports available to support the closeout process.</p>
2:00 – 2:50	Clause Logic <i>Kathleen Lemming and Chris Webster</i> <p>The CLS provides enterprise-wide support for clause selection for solicitation and contract creation. Learn how our experts implemented and tested the logic that selects and recommends clauses for all contract types, and how you can utilize this exciting tool in your ERP or contract writing system.</p>	GEX Overview <i>Gary Wooddell</i> <p>The Global Exchange (GEX) connects many of our enterprise and Component systems together providing standard mapping and routing of transactions and providing validation capabilities for our data sets. Come to this session to understand how the GEX can and should be used, its benefits and procedures, and its place in the P2P business process.</p>	Procurement Integrated Enterprise Environment (PIEE) Hierarchy** <i>Lisa Romney, Adarryl Roberts, and Matt Jacobs</i> <p>The PIEE hierarchy drives user experience and access within this data-centric environment, and supports management of multiple enterprise procurement capabilities. Learn how you can use the hierarchy to best support your business.</p>	Government-Furnished Property Module Overview** <i>Carol Vigna and Pam Rooney</i> <p>Accurate tracking of Government Furnished Property (GFP) requires a full life-cycle approach to ensure appropriate accountability and traceability. The GFP Module will provide a consolidated ecosystem for GFP management that will require assistance from a variety of communities. In this session, we will describe the GFP Module's current essential capabilities and the plans for implementation of the future phases that will include dispositioning and sending updates to property books.</p>	Solicitation Portal <i>Bruce Propert, DTRA, MDA</i> <p>Come hear about one of the latest enterprise capabilities – the Solicitation Portal! This module in PIEE will use data standards and configurable workflow to support RFX development and routing and capture bid and proposal responses.</p>
2:50 – 3:10	Break and Exhibits				

** Repeated session

Session Agenda

	Grand 1-3	International South	International Center	International North	Palm 3-5
3:10 – 4:00	Contracting Officer's Representative Tracking (CORT) Next Gen <i>Mae Bartley and Dana Chan</i> The CORT Tool provides management insight into the Contracting Officer Representative (COR) nomination and designation process. It is used to nominate, designate, track and revoke an individual as a COR against any DoD contract awarded by a Department of Defense Agency. Come to this session to learn more about the system updates and next steps.	Handshakes 2-4 Implementation/SOP <i>Bruce Propert, Ed Burke, and Stephanie Radzinski</i> The procurement and financial management communities share critical information at Handshakes 2 (pre-award funds validation), 3 (contract award/obligation) and 4 (sending procurement instrument to entitlement). Come learn about recently published Standard Operating Procedures (SOP) that provide guidance on how to operationalize the Handshake Vision.	FBO and System Administration** <i>Transition to beta.SAM</i> <i>Kat Rollins</i> The General Services Administration has been working to modernize the Integrated Award Environment systems. In this workshop, we will share how to position yourself and your agency to smoothly migrate from WDOL.gov (decommissioning June 2019) and FBO.gov (decommissioning early FY2020). This includes moving to login.gov, migrating legacy roles, administering roles, and inclusion of a single federal hierarchy.	GFP Module Phase 3 PCARSS/PLT** <i>Carol Vigna, Pam Rooney, Luke Wayne, and Karen Yamnitz</i> The next phase of the GFP Module application will focus on dispositioning GFP and will incorporate a tech refresh of DCMA's Property Loss Tool (PLT) and Plant Clearance Automated Reutilization Screening System (PCARSS) into the GFP Module environment and the related benefits. We'll talk about the features of the PLT and PCARSS processes planned for the GFP Module, timelines, what to expect and how these changes will benefit you, your contracts and programs.	Handshake 1 Challenges <i>LeAntha Sumpter and Lora Muchmore</i> The effort to standardize Handshake 1 (a purchase request and funds commitment exchange) to support traceability of requirements has been hindered by a lack of consistent policy and data standards. In this session DPC and OSD(C) will discuss the efforts that have been ongoing to address this Handshake (such as PRDS and PR numbering standards), and the challenges that remain.
4:10 – 5:00	EDA Next Generation** <i>Terry Ford and Adarryl Roberts (or delegate)</i> The Electronic Document Access (EDA) system has been redesigned to be more intuitive and easier to access. Come learn about the changes and how you can use EDA to support your contracting processes.	Navigating PDS/PRDS <i>Bruce Propert, Judy Critzer, and Kris Humphrey</i> PRDS and PDS have become powerful forces for data exchange and analysis across DoD. Come learn how to use the Purchase Request Data Standard (PRDS) version 3.0 to create and send PRs for new contracts, contract modifications, and MIPRs, and the Procurement Data Standard (PDS) for contract awards, modifications, and solicitations. Bring your questions!	Transition of Reports from FPDS to beta.SAM** <i>Christy Hermansen</i> This session takes you through the upcoming transition of standard and ad-hoc reports from FPDS.gov to beta.SAM.gov. The session will cover schedule information for the transition, features of the new reports, and a live demo. You will have time to ask questions and provide feedback.	Government Furnished Property Attachment** <i>Carol Vigna and Pam Rooney</i> The importance of having an accurate GFP Attachment is more important than ever in our current audit environment and requires collaboration from many different communities, such as program offices, logistics, property officers and contracting. We'll focus on the benefits of the GFP Attachment, advice for common issues and errors, briefly describe the method for creating one in the GFP Module, and answer any questions you may have!	MOCAS Update <i>Benjamin Novotny and Elizabeth Gibbs</i> MOCAS supports post-award contract administration, including entitlement. Come learn what is planned for the future of this mission critical system. Highlights will include an update on SLOA deployment and the use of data analytics to provide targeted process improvements.

** Repeated session

Session Agenda

Thursday, April 25, 2019

East/West Registration – Morning

8:00 – 12:00 **Registration**

Palm Foyer/Palm Patio

8:00 – 8:30 **Networking**

Palm Foyer/Palm Patio

8:30 – 9:30	Procurement Administrative Lead Time (PALT) Tool, Protest Tracker, and Other Policy Initiatives <i>Greg Snyder and Larry McLaury, A&S DPC Contract Policy and International Contracting</i> The 2017 National Defense Authorization Act required the creation of data collection tools to track Procurement Acquisition Lead Time (PALT), expenses surrounding protests, Other Transactions, and more. This session will explore the current PALT milestone initiatives and how they will be implemented, as well as other priority procurement initiatives in the Department.
9:30 – 10:30	Cyber Initiatives <i>LeAntha Sumpter, A&S DPC, and Mary Thomas, A&S DPC</i> Come to this session to hear more about our Cybersecurity workforce and their efforts to build, secure, operate, defend, and protect DoD and U.S. cybersecurity resources, conduct related intelligence activities, enable future operations, and project power in or through cyberspace.
10:30 – 11:15	Procure-to-Pay within the Services – Plenary Session <i>Introduction – LeAntha Sumpter, A&S DPC, Army – Greg Youmans, DASA(P0), Navy – Ryan Dickover, ASN(RD&A)/DASN(AP), Air Force – Patrick Knepper, SAF/AQC, Defense Agencies – Adarryl Roberts, DLA</i> The Department is poised to move from our legacy contract writing capabilities to next-generation systems. Come to this final plenary session to hear from our Component leaders their current status, plans for the future of contract writing, and how you will be impacted.
11:15 – 11:30	Wrap-Up <i>LeAntha Sumpter, A&S DPC</i>
11:30 – 12:00	Lunch – Box Lunch Provided Continuous Learning Points (CLP) Certificates To Be Distributed

Break Out Sessions – Afternoon

1:00 – 5:00	Grand 1-3	International South	International Center	International North	Palm 3-5
	Army Agenda	Navy Agenda	Air Force Agenda	ODA Agenda	GFP Working Group

Session Notes

Session Notes

Map



Hilton Orlando Lake Buena Vista

1751 Hotel Plaza Blvd
Lake Buena Vista, FL 32830
Tel: (407) 827-4000

Orlando International Airport (MCO)

One Jeff Fuqua Boulevard
Orlando, Florida 32827
Check wait times and flight status here: <https://www.orlandoairports.net/>

Presentations will be made available for download after the conference on our website:

https://www.acq.osd.mil/dpap/pdi/2019_procure_to_pay_training_presentations.html